



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Fourth Account and Report of Successor Conservator and Petition for Conservator's Fees and Attorney's Fees and for an Order Reducing the Conservatee's Allowance

		CLAUDIA SPAULDING , Successor Conservator of the Estate with bond of \$125,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: If granted, the Court will set a status hearing for the filing of the Fifth Account as follows: • Thursday March 1, 2018
		Account period: 1/1/14 – 12/31/15 Accounting: \$133,988.30 Beginning POH: \$28,795.41 Ending POH: \$30,704.99 (\$3,280.55 cash plus a 50% interest in real property)	
	Aff.Sub.Wit.		<p>Conservator: \$7,270.00 (for 242 hours @ \$25/hr and 122 hours @ \$10/hr for services including balancing statements, assembling data, trips to the bank, communications, meeting with service technicians, and one-half of landlord duties, plus 110 hours @ \$25/hr for taking the Conservatee to appointments, yard work on house, packing and moving the Conservatee, itemized at Exhibit B)</p> <p>Attorney: \$1,200.00 (less than local rule)</p> <p>Costs: \$830.00 (filing)</p> <p>Conservatee's allowance: Petitioner states pursuant to the Court's order entered on 4/16/12 reduced the allowance from \$300 to \$200/week, which was paid to Conservatee through 6/15/14. Thereafter, since the Conservatee was residing at Valley Christian Home where food and other services were provided, Petitioner reduced the allowance to \$400/month (\$200 on the 1st and 15th of each month.) Petitioner requests approval of the reduction.</p> <p>Petitioner states the other half of the conservatee's real property is owned by the trust of which the Conservatee is the sole beneficiary. Pursuant to agreement, rent on the property is paid 100% to and accounted for in the conservatorship estate. Petitioner is also trustee of the trust and an account has been filed concurrently in that matter.</p> <p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> 1. Settling and allowing the Fourth Account and confirming and approving the acts of Petitioner as Conservator; 2. Authorizing Conservator's and Attorney's compensation; 3. Authorizing the reduction and change of Conservatee's allowance to \$400/month; and 4. For such other and further relief as the Court may deem proper.
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: skc

Reviewed on: 2/29/16

Updates:

Recommendation:

File 1- Angell

Fifteenth Account and Report of Trustee, Petition for Settlement Thereof and for Allowance of Trustee's Fees and Attorney's Fees

		CLAUDIA SPAULDING , Trustee, without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/1/14 – 12/31/15	Note: If granted, the Court will set a status hearing for the filing of the Fifth Account as follows: • Thursday March 1, 2018
		Accounting: \$348,401.00	
		Beginning POH: \$277,243.75	
		Ending POH: \$242,964.14	
	Aff.Sub.Wit.	((\$21,350.74 cash plus a 50% interest in real property and various securities)	
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Trustee: \$2,720.00 (for 94 hours @ \$30/hr for services including balancing statements, redemption of assets as needed, trips to bank, assembling data, rental management/landlord duties, itemized at Exhibit B)	
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	Attorney: \$750.00 (discounted, for 2.5 hours @ \$300/hr for services in connection with the preparation of this account and petition.)	
	Conf. Screen		
	Letters		
	Duties/Supp	Costs: \$830.00 (filing)	
	Objections		
	Video Receipt	Petitioner prays for an order:	
	CI Report	5. Settling and allowing this account and confirming and approving the acts of Petitioner as Trustee;	
	9202	6. Authorizing Trustee's and Attorney's compensation; and	
✓	Order	7. For such other and further relief as the Court may deem proper.	
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 2/29/16
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 2- Angell

Probate Status Hearing RE: Filing of a Petition to Approve the Settlement Agreement

			<div>NEEDS/PROBLEMS/COMMENTS:</div> <div><div>OFF CALENDAR</div><div>Petition For Order Authorizing Personal Representative to Sign the Settlement Agreement on Behalf of Estate filed 2/29/16 is set for hearing on 4/12/16.</div></div>
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2/29/16
			Updates:
			Recommendation:
			File 3- Garcia

Petition for Visitation

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
Cont. from 121015, 011416, 012816			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p><u>Minute Order 1/28/16:</u> Raina Salinas, mother, represents that she was served on 1/23/16; requests time to seek legal advice. The Court grants one continuance for the request. Any written objections are to be filed and properly served no later than 2/16/16 or the Court may not consider them.</p> <p><u>Note:</u> On 2/4/16, the Guardian filed an ex parte petition to stop the visits with the mother, which was set for noticed hearing. See Page B.</p> <p><u>Note:</u> On 2/16/16, Raina Salinas, mother, filed an objection to the petition and a Petition for Termination of Guardianship, which has been set for hearing on 4/25/16.</p>
			Reviewed by: JF/skc
			Reviewed on: 2/29/16
			Updates:
			Recommendation:
			File 4A - Chavez

Ex Parte Petition RE: Visitation

		<p>ANTONIO CONTRERAS, Guardian, filed this Ex Parte Petition RE: Visitation on 2/4/16.</p> <p>On 2/5/16, the Court set the matter for hearing along with the existing matter at Page A. Notice of the ex parte hearing was served on RAINA SALINAS, Mother, by mail on 2/19/16.</p> <p>See petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 3/1/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4B- Chavez</p>	

Status Hearing Re: Informal accounting of closing reserve

DOD: 8/28/11		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Informal account filed 3/1/16.
Cont. from 052015, 111215, 020416		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: skc		
Reviewed on: 2/29/16		
Updates: 3/1/16		
Recommendation:		
File 5 - Quinn		

6 Alexxia E. Valdez & Sofia J. Valdez (GUARD/P) Case No. 12CEPR00284

Petitioner Valdez, Yolanda (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person

Alexxia, 4	<u>TEMPORARY EXPIRES 03/03/2016</u>	NEEDS/PROBLEMS/COMMENTS:
Sofia, 1	YOLANDA VALDEZ, maternal grandmother, is	Minute Order of 01/21/2016:
	Petitioner.	Examiner notes provided in Court.
	<u>Please see petition for details</u>	
Cont. from 012116		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.	w/	
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none">• Benny (Father of Sofia) – Unless the Court dispenses with notice.
		Note: Declaration of Due Diligence filed 02/10/2016.
		2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none">• Paternal Grandfather of Alexxia (Unknown)• Paternal grandparents of Sofia (Unknown) – unless the Court dispenses with notice.
		Note: Declaration of Due Diligence filed 02/10/2016
		Reviewed by: LV
		Reviewed on: 03/01/2016
		Updates:
		Recommendation:
		File 6- Valdez

7 George Bonilla-Ramirez & Azariah Ramirez (GUARD/P) Case No.13CEPR00188

Attorney Lovegren-Tipton, Amy R. (for Elisa and Jorge Ramirez – Paternal Grandparents – Petitioners)

Attorney Butler, R. Frank (for Roberta Galindo – Guardian)

Petition for Visitation

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> This hearing was originally set for hearing on 1/21/16; however, pursuant to Stipulation filed 1/14/16, the matter was reset for 3/3/16. Stipulation states the parties are attempting to resolve the matter. As of 3/1/16, nothing further has been filed.
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>		
<input type="checkbox"/>	Inventory	<input type="checkbox"/>		
<input type="checkbox"/>	PTC	<input type="checkbox"/>		
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>		
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>		
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>		
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>		
<input type="checkbox"/>	Conf. Screen	<input type="checkbox"/>		
<input type="checkbox"/>	Letters	<input type="checkbox"/>		
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>		
<input type="checkbox"/>	Objections	<input type="checkbox"/>		
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>		
<input type="checkbox"/>	CI Report	<input type="checkbox"/>		
<input type="checkbox"/>	9202	<input type="checkbox"/>		
<input type="checkbox"/>	Order	<input type="checkbox"/>		
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>		
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>		
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>		
<input type="checkbox"/>	Citation	<input type="checkbox"/>		
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>		
			Reviewed by: skc	
			Reviewed on: 3/1/16	
			Updates:	
			Recommendation:	
			File 7- Ramirez	

Petitioner: Rosie H. Acosta (pro per)

Petition for Final Distribution on Waiver of Accounting (And for Allowance of Statutory Commissions)

DOD: 3/31/14		ROSIE ACOSTA , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
Cont. from 100815, 111915, 012116		I & A - \$864,681.16	1. Need Order. <u>Note:</u> order must comply with Local Rule 7.6.
		POH - \$803,970.24	
<input type="checkbox"/>	Aff.Sub.Wit.	Administrator - \$20,293.62	
<input checked="" type="checkbox"/>	Verified	(statutory)	
<input checked="" type="checkbox"/>	Inventory	Closing - \$1,000.00	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Distribution, pursuant to intestate succession and disclaimer of interest by Thomas Acosta Sr., is to:	
<input checked="" type="checkbox"/>	Aff.Mail	Rosie Acosta - real	
	Aff.Pub.	property, stocks, personal property and cash in the amount of \$552,352.24.	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	7/25/14	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
	Order	X	
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 3/1/16
	UCCJEA		Updates:
	Citation		Recommendation:
<input checked="" type="checkbox"/>	FTB Notice		File 8 – Acosta

Petition for Payment of Attorney's Fees

		JENNIFER L. WALTERS , Court appointed counsel for Conservatee, is Petitioner. Petitioner was appointed to represent the Conservatee on 6/11/14. Rochelle Rosenbalm was appointed Conservator on 12/8/14. Petitioner requests \$9,281.50 in fees plus \$896.00 in costs in connection with the representation of the Conservatee for the period of 6/18/14 through 1/14/16. Itemization at Exhibit A indicates 35 hours @ \$265/hr for services including conferencing and correspondence with client and other parties/attorneys, review of documents, preparation of stipulation, attendance at hearings, substituted judgment re trust, etc.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner requests \$9,281.50 in fees and \$896.00 in costs, but indicates a total of \$10,277.50, which total appears to include what is reflected on the itemization as an additional \$50 flat fee for .7 hours to "arrange file." The Court may require clarification. 2. Petitioner served the Conservator/Trustee Rochelle Rosenbalm "c/o" her attorney, Lee S.W. Cobb. Direct notice is required pursuant to Probate code §1214 and Cal. Rule of Court 7.51.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: skc Reviewed on: 3/1/16 Updates: Recommendation: File 9- Keehn			

		<p>SHARON SHRIVES, was appointed Conservator of the Person and of the Estate on 09/25/2014 with bond set at \$40,000.00.</p> <p>Letters issued on 09/25/2014.</p> <p>Final Inventory and Appraisal filed 03/05/2015 showing and estate valued at \$10,072.48.</p> <p>Minute Order of 09/25/2014 set this Status Hearing for the filing of the First Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>10B is Petition for Transfer.</p> <p>Minute Order of 01/28/2016: Counsel represents that the accounting is completed, he is just awaiting review and signature by his client. No appearance is necessary at the status hearing if filed at least two days prior.</p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 120315, 012816			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: LV</p> <p>Reviewed on: 03/01/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10A – Mardis</p>	

Petition for Transfer

Age: 82 years		SHARON SHRIVES was appointed conservator on 9/25/14 with bond set at \$40,000.00. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 01/28/2016: Trailing the filing of the First Account. Note: A status hearing for the filing of the first account was continued to 03/03/2016. It appears that this petition should not be approved until after the approval of the first account. Therefore the court may wish to continue this matter to 03/03/2016 to be heard with the status hearing for the filing of the first account. Note: If the petition is granted, a status hearing will be set as follows: <ul style="list-style-type: none"> • Thursday, August 4, 2016 at 9:00 a.m. in Department 303, for the filing of the receipt of transfer.
Cont. from 121715, 012816			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: LV			
Reviewed on: 03/01/2016			
Updates:			
Recommendation:			
File 10B - Mardis			

Attorney Shepard, Jeff S. (for Raynette Grant – Executor – Petitioner)

Objector Dunn, Robyn R. (Pro Per – Daughter)

First Account and Report of Administration and Petition for Settlement

DOD: 09/25/2014		RAYNETTE GRANT , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 01/28/2016: Counsel suggests a continuance in order for further exchange of information with Ms. Dunn.
		Account period 09/25/2014 to 12/15/2015	
		Accounting - \$162,262.93	
		Beginning POH - \$113,395.69	
		Ending POH - \$114,660.43 (\$46,604.43 is cash)	
Cont. from 012816		Petition states the estate is not in a condition to be closed for the following reason:	
<input type="checkbox"/>	Aff.Sub.Wit.	By the terms of the will of the deceased, the residue of the estate is devised and bequeathed in percentage amounts of twenty (20% each to four heirs/beneficiaries, ten (10%) to one heir and five (5%) percent to two heirs. The remaining asset of decedent's estate is forty (40%) interest in a condominium which makes it impractical to distribute in kind. The condominium has been listed with a real estate broker for sale; no acceptable offers have been received.	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	10/16/14	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
Wherefore, petitioner prays for an order and judgment as follows: <ol style="list-style-type: none"> 1. Settling and allowing the first account and report as filed; 2. Ratifying, confirming and approving all of the acts and transactions of petitioner as executor; 3. Making such further order as the Court deems proper. <p style="text-align: center;"><u>Please see additional page</u></p>			Reviewed by: LV Reviewed on: 03/01/2016 Updates: Recommendation: File 11- Rowley

Objection to First Account filed by Robyn Dunn on 01/13/2016 states she hereby objects to the First Account and Petition for Settlement as Follows:

1. Decedent's property located at 2648 N. Armstrong Fresno, Ca. and noted in Will is not present.
2. Monaco Mobile Home Documentation.
3. Decedent's Property located at Lot 18 of Tract N476 W. Barstow #101 Documentation as to holding of other 60%
4. Income from Rental Property located at 476 W. Barstow #101 08/01/2014 to 07/01/2015.
5. Raye Grant, Executor has not acted impartially in her role as Executor of Will and Distribution of the Estate.
6. Many items were removed from the property prior to appraisals.

Response to First Accounting Objection filed 01/21/2016 by Attorney Jeff S. Sheppard states the decedent included in his will real property located at 2648 N. Armstrong, Fresno, Ca. 93727. However, in 2002, decedent sold said real property to Raynette R. Grant as Trustee of the Raynette R. Grant Family Trust dated 10/01/2001. The decedent's personal property located at 2648 N. Armstrong was sold at auction and proceeds are shown in Receipts, Schedule B, Page 3 of the accounting.

The Monaco motor (mobile) home had been disposed of by decedent prior to his death; a copy of the Oregon Vehicle Certificate of Title processed 090408 from Decedent to Diana Lynn Tompkins and Austin Jay Rowley is attached as Exhibit B.

A copy of the Grant Deed for the real property described by objector as Lot 18 of Tract 2607 LaVille Barstow, No 101, Fresno to Fred Rowley, an unmarried man, as to an undivided 40 percent and Raynette Grant, an unmarried woman, as to an undivided 60 percent, is attached as Exhibit C.

The rental income was inadvertently omitted from the accounting; a Declaration Correcting First Account and Report of Administration and Petition for Settlement is being filed concurrently herewith and a copy is attached as Exhibit D.

Nothing has been distributed except specific personal items the decedent set forth in his will; these were distributed prior to the auction to save the estate the expense of protecting them.

Objector, Robyn R. Dunn, was on the property many times. Objector knew the auction date and affirmed that she would tell her children. Objector was at the property the morning of the auction date. The auction date was advertised in the Fresno Bee and online prior to the sale date. There is no specific list of items objector says were removed prior to appraisals to petitioner cannot respond further.

Status Report by Attorney filed 02/29/2016 states a first account and report was filed 12/17/2015; An objection to first accounting by Robyn R. Dunn, was filed 01/13/2016; A response to first accounting was filed 01/21/2016; all objections have been addressed; All other matters stated in the Status Report filed 12/01/2015, remain the same. The estate is not in a condition to be closed. Attorney and the Executor will be in Court on March 3, 2016.

DOD: 06/03/2014	YESENIA TORRES FAJARDO , was appointed Administrator with limited IAEA authority without bond on 10/24/2014.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 01/21/2016: Counsel represents that there is a possible agreement, and requests time to finalize the terms. No appearance is necessary at the status hearing if the petition is filed at least two court days prior. 1. Need First Account or Petition for Final Distribution.
Cont. from 012116	Letters issued on 11/05/2014.	
Aff.Sub.Wit.	Inventory and Appraisal filed 12/22/2015 shows an estate valued at \$120,000.00.	
Verified	Minute Order of 10/24/2014 set this Status Hearing for the filing of the First Account and/or Petition for Final Distribution.	
Inventory	Status Conference Statement filed by Attorney H. Ty Kharazi on 02/25/2016 states the estate is composed of real property and some personal items which are of inconsequential value. There has been a settlement on the disposition of the real property a part of which requires transfer of decedent's personal items to his children. The parties are meeting on 02/26/2016, in the late afternoon hours to inspect and exchange these personal items. Once that come to pass, the children are ready to sign off on the sale of the real property to the widow (Ms. Torres) in exchange for payment of the funds to Mr. Bagdasarian's trust account on their behalf. The children will also waive accounting. Mr. Kharazi requests another status conference about late April or early May. If the accounting is filed the hearing be vacated.	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LV
Reviewed on: 03/01/2016
Updates:
Recommendation:
File 12- Gutierrez

Petition for Final Distribution on Waiver of Accounting and for Allowance of Statutory Commissions

DOD:12/24/14		JOHN ROMAGNOLI , Executor with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: \$983,075.00 POH: \$400,508.00 cash plus three real property assets Executor (Statutory): \$23,097.76 Attorney (Statutory): \$23,097.76 Closing: \$5,000.00 Distribution pursuant to the decedent's will and codicils: Scott Holmes: \$50,000.00 Olena Volyk: \$94,300.82 plus \$6,233 in rental income plus certain real property Nancy Hendrix: \$94,300.82 plus \$5,670 in rental income plus certain real property John Romagnoli: \$94,300.82 plus \$4,507 in rental income plus certain real property	NEEDS/PROBLEMS/COMMENTS:	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			
Reviewed by: skc				
Reviewed on: 3/1/16				
Updates:				
Recommendation: SUBMITTED				
File 13- Ulansky				

		<p>LAURA CASTILLO, mother, was appointed guardian of the estate without bond on 06/30/2015.</p> <p>Letters issued on 07/15/2015</p> <p>Minute Order of 06/25/2015 set this Status Hearing for the filing of the Inventory and Appraisal.</p> <p>Status Report filed 02/24/2016 states the only asset of the Guardianship Estate is an undivided interest in real property being distributed from the Estate of Marcus Thomas Areyano (Fresno County Superior Court Case No. 14CEPR00811).</p> <p>The hearing date on the Waiver of Accounting and Report of Administrator and Petition for its Settlement is set for 03/14/2016 at 9:00am in Department 303. Therefore, a request is made for a 45 days continuance to file the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 11/19/2015: Counsel requests additional time. No appearance is necessary on 03/03/2016 if the Inventory and Appraisal is filed at least two court days prior.</p> <p>1. Need Inventory and Appraisal.</p>
Cont. from 111915			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: LV</p> <p>Reviewed on: 03/01/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 – Areyano</p>	

Attorney Forbes, Donald R. (for Trustee Susan Leach Hansen)

Attorney Rowland, Woodford G. (for Beneficiaries Walter Leach, III and Alfred W. Leach)

Petition for Order Approving First Account, for Order Approving Settlement Agreement, for Order Releasing Funds From Blocked Account and for Instructions for Distribution of Trust Estate

DOD: 12/9/14		SUSAN LEACH HANSEN, Trustee, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Account period: 12/9/14 – 11/16/15	<p>Note: The Amended Petition to Invalidate Trust and Restatement of Trust for Lack of Capacity; Undue Influence, Elder abuse filed 6/8/15 by Beneficiaries Walter Leach, III, and Alfred W. Leach, is set for Mandatory Settlement Conference on 3/8/16 and Trial on 4/5/16.</p> <p>Note: On 2/10/16, Attorney Woodford G. Rowland, attorney for Walter Leach, III, and Alfred W. Leach, filed a Notice of Non-Opposition to this First Account.</p>
		Accounting: \$1,051,929.90	
		Beginning POH: \$1,011,546.21	
		Ending POH: \$ 907,401.88 (cash, mostly held in blocked account per stipulation)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	See petition for explanation of assets, various transactions.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner states the parties to the trust contest have disputed and continue to dispute the meaning and effect of certain notations on the trust document, Marian's capacity, and Susan's influence. To avoid further expense of litigation, diminution of the trust estate, acrimony between family members and the uncertainties of trial, including potential for appeal, Petitioner negotiated a settlement with the beneficiaries Walter III and Alfred. See petition and attached Settlement Agreement for specific terms.	
<input checked="" type="checkbox"/>	Aff.Mail	w	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Petitioner states that the litigation having been settled, the funds held in the blocked account can be released and distributed.	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	Petitioner requests the Court instruct Petitioner as trustee that the trust estate be disbursed as follows:	
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt	See petition for details.	
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

SEE PAGE 2

Reviewed by: skc

Reviewed on: 3/1/16

Updates:

Recommendation:

File 15- Leach

Page 2

Petitioner prays the Court find and decree the following orders, instructions and relief:

1. An order approving Trustee's First Account for the period 12/9/14 through 11/16/15
2. An order approving the settlement and terms of the Settlement Agreement, including the releases, as fair and reasonable under all the facts and circumstances;
3. An order authorizing Petitioner as trustee to settle the claims and execute the Settlement Agreement, binding Walter III, Alfred, Trustee and Susan and each of their respective heirs, executors, representatives, assigns and successors to all of the terms of the settlement and releases set forth in the Settlement Agreement;
4. An order releasing the funds in the blocked account for deposit into the trust checking account for disbursement as herein provided;
5. An order of instructions authorizing trustee to hold a reserve and disburse the remaining funds as set forth above; and
6. For such other and further relief as the Court deems just and proper.

16A Consepsion R. Jaurigue (CONS/PE) Case No. 15CEPR00637

Attorney Bagdasarian, Gary G. (for Corina Jaurigue – Petitioner – Granddaughter)

Attorney Horton, Lisa (Court Appointed for Proposed Conservatee)

Attorney Kruthers, Heather K. (for Public Guardian)

Attorney Zavala, Gilbert (for Christina Tabarez - Respondent/Competing Petitioner - Daughter)

Respondent Jaurigue, Jose Rios (Pro Per – Respondent – Son)

Respondent Espinoza, Isela (Pro Per – Respondent – Granddaughter)

Respondent Jaurigue, Antonio (Pro Per – Respondent – Son)

Respondent Jaurigue, Enrique (Pro Per – Respondent – Son)

Petition for Appointment of Probate Conservator of the Person

Age: 85		<u>PUBLIC GUARDIAN APPOINTED CONSERVATOR OF THE PERSON</u> <u>TEMPORARY EXPIRES 03/03/2016</u> CORINA JAURIGUE, granddaughter is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Page 16B is the competing petition filed by Christina Tabarez, daughter. Minute Order of 01/14/2016: The Court still reserves the right to appoint the Public Guardian as to the estate in the future. Court Investigator Advised Rights on 07/13/2015. Voting Rights Affected Need Minute Order.	
Cont. from 072915, 091615, 100115, 011416				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
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<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: LV				
Reviewed on: 03/01/2016				
Updates:				
Recommendation:				
File 16A – Jaurigue				

16B Consepson R. Jaurigue (CONS/PE) Case No. 15CEPR00637

Attorney Bagdasarian, Gary G. (for Corina Jaurigue – Competing Petitioner – Granddaughter)

Attorney Horton, Lisa (Court Appointed for Proposed Conservatee)

Attorney Zavala, Gilbert (for Christina Tabarez - Petitioner - Daughter)

Petition for Appointment of Probate Conservator of the Person & Estate

Age: 85		<u>PUBLIC GUARDIAN APPOINTED CONSERVATOR OF THE PERSON TEMPORARY EXPIRES 03/03/2016</u> CHRISTINA TABAREZ , daughter is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 09/18/2015. Voting Rights Affected Need Minute Order. Minute Order of 01/14/2016: Mr. Zavala requests 6-8 weeks to address the defects. The Court still reserves the right to appoint the Public Guardian as to the estate in the future. The following issues remain: 1. Need Citation. 2. Need proof of personal service of the Citation and a copy of the Petition on the proposed conservatee. 3. Petition indicates the proposed conservatee receives Social Security in the amount of \$923 a month, \$11,076.00 yearly. If the proposed conservatee is only receiving Social Security there is no need to establish a conservatorship of the estate as the petitioner can become the proposed conservatee's payee. A conservatorship of the estate would require the conservator to file accountings. 4. Need Order. 5. Need Letters.
Cont. from 100115, 011416			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv. x		
<input checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters x		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order x		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation x		
<input type="checkbox"/>	FTB Notice		
Reviewed by: LV			
Reviewed on: 03/01/2016			
Updates:			
Recommendation:			
File 16B - Jaurigue			

Petition to Determine Succession to Real Property (Prob. Code §13150)

DOD: 5/31/14		<p>MANUEL PACHECO, Spouse, is Petitioner.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$75,000.00 (Real property in Firebaugh, CA)</p> <p>Decedent died intestate</p> <p>Petitioner requests Court determination that the decedent's 100% interest in the real property in Firebaugh passes to him 100%.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 1/28/16:</u> Counsel reports that an agreement has unraveled and additional time is needed for discussions.</p> <p><u>Note:</u> On 2/23/16, Petitioner filed a Declaration that attaches a complete Amended Petition (with three additional petitioners); however, the Amended Petition was not properly filed and is therefore not properly before the Court.</p> <p>The following issue remains noted as to the petition filed 9/15/15:</p> <ol style="list-style-type: none"> 1. The decedent has four children. Pursuant to Probate Code §6401, it appears Petitioner would be entitled to a 1/3 share, and the decedent's children would be entitled to share the remaining 2/3. <p>Pursuant to Probate Code §13150, all successors in interest must petition together in order for this summary proceeding to be used.</p> <p><u>Note:</u> When the amended petition is properly filed, it must be brought by <u>all</u> successors in interest. (The amended petition attached to the declaration is still missing one petitioner, son Samuel B. Cruz.)</p>	
Cont. from 102715, 120715, 012816				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: skc</p> <p>Reviewed on: 2/29/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 – Pacheco</p>				

Petitioner Kharazi, H. Ty (for Paula Jean Whitmire – Daughter – Petitioner)
 Attorney Fanucchi, Edward L. (Court appointed attorney for Proposed Conservatee)

Amended Petition for Appointment of Probate Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			Court investigator advised rights on 10/23/15
			Voting rights affected – need minute order
			<u>Minute Order 1/21/16: Mr. Kharazi represents that he has the original bond and will file it this morning. Matter continued for Mr. Kharazi to file a declaration with regard to the value of the property.</u>
			<u>Note: A Second Amended Petition was filed 2/29/16 and is set for hearing on 4/12/16. This hearing was not taken off calendar due to the temp conservatorship currently in place which expires 3/3/16.</u>
			The following issues remain noted with regard to this First Amended Petition:
			<u>SEE ADDITIONAL PAGES</u>
			Reviewed by: skc
			Reviewed on: 2/29/16
			Updates:
			Recommendation:
			File 18 – Garoppo

Cont. from 110515, 111915, 012116		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
✓ Aff.Mail	W	
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.	W	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
✓ Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
✓ Citation		
FTB Notice		

Page 2 – NEEDS/PROBLEMS/COMMENTS:

1. As previously noted, Petitioner checks the box at #1k re dementia powers, but did not attach the mandatory Judicial Council Form #GC-313 Attachment Requesting Special Orders Regarding Dementia to the amended petition which specifies the powers being sought. Therefore the request for such powers still has not been properly served on the proposed Conservatee or relatives. Need attachment to be filed and served on interested persons.
2. Petitioner checks the box at #1d requesting orders authorizing independent exercise of powers under Probate Code §2590. However, Petitioner did not provide attachment describing the specific powers and reasons, and also did not indicate that the Conservatee owns any real property for which such powers would be necessary or appropriate. Pursuant to Local Rule 7.15.2, it is the policy of the court to grant only those independent powers necessary in each case to administer the estate. A request for all powers under §2591 will not be granted. Each independent power must be justified by and narrowly tailored to the specific circumstances in the case. Therefore, need clarification.
3. Petitioner checks the box at #1f requesting specific powers under §§ 2351-2358, but Petitioner did not provide attachment describing the specific powers and reasons. Typically, these powers only need be specified in a limited conservatorship situation. Therefore, need clarification.
4. Petitioner was previously appointed Temporary Conservator of the Person and Estate without bond, and pursuant to Minute Order 11/19/15, bond would be set at \$60,720.00 upon appointment. As noted above, Petitioner filed "Notice of Posting Bond" on 12/14/15 with an attached copy of a bond in the amount of \$60,720.00; however, no original bond has been filed.
5. The bond amount of \$60,720.00 was previously based on information provided to the Court Investigator regarding the proposed conservatee's assets and income (\$2,600/month or annual income of \$31,200 plus \$24,000 in savings). However, at that point, no actual estimate was included in the petition. The Investigator's report also indicates various additional personal property assets like vehicles that could be sold to pay for his care, but the values are not included in this estimate.

This amended petition now indicates different figures - \$10,000.00 in unspecified personal property plus annual income of \$54,010.00, which would result in a bond requirement of at least \$69,817.00. Examiner notes that the personal property figure should include any bank account balances as well as personal property assets, and as noted above, Petitioner does not indicate the value of real property, if any, and if additional independent powers are granted, bond should cover that value as well.

Therefore, need clarification regarding the discrepancy between the \$24,000 in savings previously indicated plus additional assets, and the \$10,000 estimate in this amended petition.

Petitioner is reminded to review Cal. Rule of Court 7.204 (duty to apply for increase). The Court may require increase at this time, or may require ex parte review upon the filing of the Inventory and Appraisal.

SEE ADDITIONAL PAGES

Page 3 – NEEDS/PROBLEMS/COMMENTS (Cont'd):

6. Need new order and letters per Local Rule 7.1.1.F. Petitioner is reminded that the Judicial Council Order Appointing Probate Conservator was recently revised on 1/15/16 and the most recent revision must be used.

Note: When granted, the Court will set status hearings for the filing of the Inventory and Appraisal and First Account; however, due to the filing of a Second Amended Petition, status dates are not calculated at this time.

Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> A competing petition was filed 3/1/16 by Gary Wortham (Father) that is set for hearing 4/13/16. Court Investigator advised rights on 12/1/15. Voting rights affected – need minute order. <u>Minute Order 1/28/16:</u> No appearance by Petitioner Selene Hedrington; Gary Wortham appeared. Petitioner is ordered to be personally present in court on 3/3/16.
Cont. from 121015, 012816				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2/29/16	
			Updates: 3/1/16	
			Recommendation:	
			File 19 - Wortham	

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Continued from 1/21/16 The following issue remains noted: 1. Petitioner filed a Declaration of Due Diligence re Daniel Olvera, Father. If diligence is not found, need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> Consent & Waiver of Notice <u>or</u> further diligence re Daniel Olvera, Father.
Cont. from 012116				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	x		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: JF/skc	
			Reviewed on: 3/1/16	
			Updates:	
			Recommendation:	
			File 20- Tamez	

Petition to Appoint Successor Trustee

		BARBARA M. BRIDGES is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 012816			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
<p>The Bridges 2001 Trust (the "Trust") was executed by declaration of Trust on March 28, 2001, by Barbara M. Bridges and Ricky J. Bridges as Trustors, and Richard A. Jones, as Trustee.</p> <p>The Trust is an irrevocable life insurance trust, or "ILIT". The sole asset of the Trust is a second to die whole life insurance policy with Barbara M. Bridges and Rickey J. Bridges as the insured lives.</p> <p>Trustors' children, Viktor J. Bridges and Desiree D. Bridges, are co-equal beneficiaries of the Trust. Distribution of the policy benefits to said beneficiaries is triggered when both Trustors have deceased.</p> <p>In 2002 the Trustors divorced. A this time, Petitioner and Ricky J. Bridges agreed that the Trust would continue in full force and effect, and to that end each gifted the sum of \$12,000 to the Trust and its beneficiaries as prepayment of the policy premiums. The policy premiums are expected to remain prepaid for the life of the policy.</p> <p>Richard A. Jones is the current Trustee of the Trust and continues to act as such. Richard A. Jones, however, has been stricken with various personal health concerns and it is uncertain how much longer he will be able to act as Trustee of the Trust.</p> <p>Please see additional page</p>			
			Reviewed by: KT
			Reviewed on: 3/1/16
			Updates:
			Recommendation:
			File 21- Bridges

The terms of the Trust provide on the event that Richard A. Jones should resign, become incapacitated or otherwise become unwilling or unable to serve as Trustee, Elizabeth Bridges shall act as Successor Trustee. Elizabeth Bridges has declined to act as Successor Trustee of the Trust.

Therefore, Petitioner asserts that a vacancy exists in the office of Successor Trustee of the Trust.

Petitioner further asserts that the Trust beneficiaries Viktor J. Bridges and Desiree D. Bridges, the children of Trustors, are fit and proper persons to fill the vacancy in the office of Successor Trustee.

Neither Petitioner nor beneficiaries, Viktor J. Bridges or Desiree D. Bridges have had any contact or communication with Ricky J. Bridges since 2004. Petitioner is informed and believes that Trustor Ricky J. Bridges is a resident of the country of Venezuela, but after reasonable and diligent search, Mr. Bridges' exact whereabouts cannot be ascertained.

Beneficiaries, Viktor J. Bridges and Desiree D. Bridges are not named in the trust instrument as trustees, however Petitioner asserts that the purpose of any bond requirement is protection of the beneficiaries' interest. Therefore, Petitioner request that the bond requirement be waived.

Wherefore, Petitioner prays for an order:

1. In the event that Richard A. Jones, should resign, become incapacitated or otherwise be unable or willing to serve as trustee, Victor J. Bridges and Desiree D. Bridges shall act as Co-Successor Trustees of the Bridges 2001 Trust, dated March 28, 2001, to serve without bond. In the event that either of them should be unable or unwilling to act for any reason, the remaining person shall act as Successor Trustee alone.

Petition for Appointment of Probate Conservator of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 2/11/16 Voting rights affected – need minute order. 1. Although Petitioner checked the box at #1k re dementia powers, Petitioner did not include the mandatory Judicial Council Form GC-313 Attachment Requesting Special Orders Re Dementia. Therefore, service on relatives and the proposed Conservatee did not include the specific request for dementia medication and/or placement powers. If dementia powers are requested, the Court may require this form to be separately filed and served. 2. Need capacity declaration in support of the request for medical consent and dementia powers. 3. Need video receipt per Local Rule 7.15.8.A. 4. Petitioner states she is unable to locate three of the proposed conservatee's siblings for service. If diligence is not found, notice may be required per Probate Code §1822.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 3/1/16
			Updates:
			Recommendation:
			File 24- Hernandez

Petition for Appointment of Probate Conservator

			TEMPORARY EXPIRES 3/3/16	NEEDS/PROBLEMS/COMMENTS:
			PUBLIC GUARDIAN is petitioner and requests appointment as conservator of the person and estate.	Minute order dated 2/16/16 from the hearing on the temporary petition states any objections are to be filed by 2/13/16.
Cont. from 021616			Please see petition for details.	Court Investigator Advised Rights on 2/24/16.
	Aff.Sub.Wit.			
✓	Verified		Court Investigator Report filed on 2/25/16	
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
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	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
				Reviewed by: KT
				Reviewed on: 3/1/16
				Updates:
				Recommendation:
				File 25- James

Petition for Letters of Special Administration

DOD: 11/11/25		<p>SHARON BARADAT, daughter, is petitioner and requests appointment as Special Administrator.</p> <p>Petition states among the decedent's estate is real property with an approximate fair market value of \$240,000 and encumbrances of \$200,000, secured by a Wells Fargo reverse mortgage. Pending a Petition filed by the Trustee of the 2005 Ferrer Family Trust for an order determining trust's title to property, it is necessary that someone be named and empowered by the court to immediately take charge of protecting decedent's interest from foreclosure from Wells Fargo.</p> <p>On 2/9/16 Wells Fargo contacted Petitioner and informed her that she had until March 10, 2016 to cure an alleged default or the property would go to foreclosure. On 2/16/16, contacted the Petitioner to advise that she must enter into a listing agreement for the sale of the real property in order to obtain an extension on the foreclosure of the real property.</p> <p>To protect the decedent's interest, Petitioner is required to list the real property for sale. However, any sale would be subject to court confirmation unless the petition determining title in the name of the trust is granted before any offer is accepted.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A Petition to Determine Title To Trust Property has been filed in case no. 16CEPR00196. The hearing on that matter is scheduled for 4/11/16.</p> <ol style="list-style-type: none"> Petition does not include any information as to why it is necessary for the Petitioner to be granted the authority to take possession of the personal property and to collect rents and other income of the estate. If there are rents and other income belonging to the estate that needs to be protected the court may require bond. Need Duties and Liabilities. It doesn't appear that the original will of Betty Lou Ferrer has been deposited with the court as required by Probate Code §8200. 	
Cont. from				
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<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<input type="checkbox"/>	Objections			
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<input type="checkbox"/>	FTB Notice			
			<p>Reviewed by: KT</p> <p>Reviewed on: 3/1/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 26- Ferrer</p>	

Petitioner requests the Court grant her the powers of a special administrator to:

1. Take possession of all of the real and personal property of the estate and preserve it from damage, waste and injury.
2. Collect all claims, rents, and other income belonging to the estate.
3. Commence and maintain or defend suits and other legal proceedings.

Petitioner also requests that the Court grant her the powers of a special administrator to:

1. List the estate real property for sale with a licensed real estate agency at its fair market value. Any offers proposed to be accepted would be subject to court approval unless and until such time that the property is determined to be an asset of the decedent's 2005 Ferrer Family Trust.